A 9055-54 4/90

TVB

A RESEARCH TREND REPORT

TRENDS
IN CABLE TV

Prepared by the TVB Research Department 1/90

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

TRENDS IN CABLE TELEVISION

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HIGHLIGHTS

* Cable is now in 56.4% of all TV households. Pay cable is in 29.4% of all TV households. Pay cable as a percent of cable households is now at 52.3%, down from a high of 60.9% in 1983. (PAGE 3)

* Estimates place cable penetration at 67% by 1998. (PAGE 4)

* Cable penetration remains highest in "B" & "C" counties, 61.9% and 61.1% respectively, and lower in "A" counties, 49.8%. (PAGE 5)

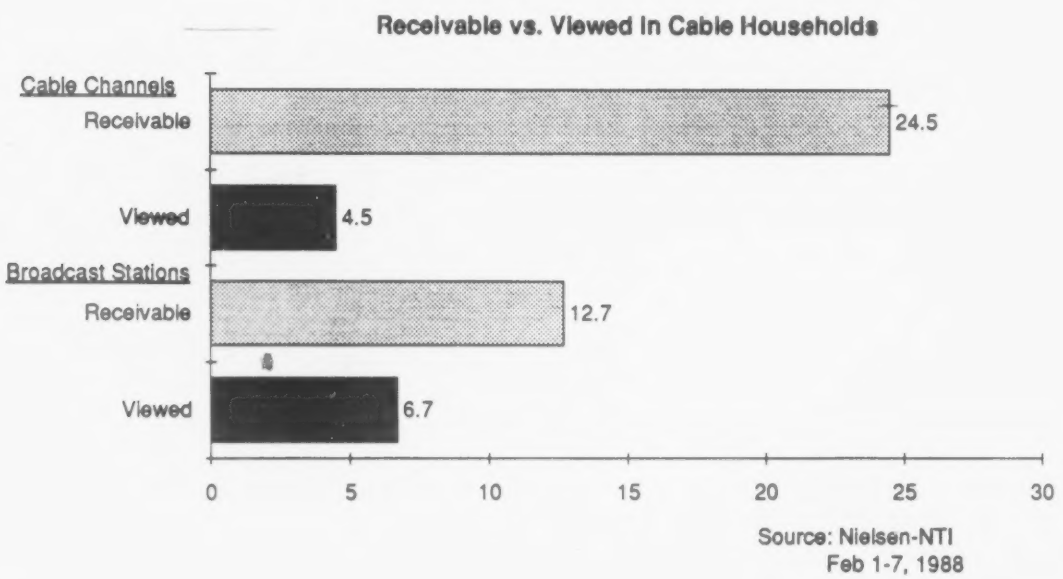
* Projections place cable TV ad revenues at only 8.5% of the total TV/cable pie by 1995. (PAGE 7)

* Cable TV's top 10 advertisers during the first half of 1989 put only 6.1% of their TV budget into cable while placing 93.9% on over-the-air TV. (PAGE 9)

* The ratings of ad supported cable networks remain low with only ESPN & USA getting more than a 1.5 rating in cable households in a given daypart. (PAGE 12)

* Over-the-air viewing remains high even in pay cable households where two thirds of the viewing is still to over-the-air stations. (PAGE 15)

* While the average cable TV household can receive 24.5 cable channels, it views only 4.5 of them or 19% during the course of a week. On the other hand it can receive 12.2 broadcast stations and views 6.7 or 55% of them during a week. (PAGE 16)



Cable and Pay Cable Households & Penetration

	Cable Households (000)	% of TV Households	Pay Cable Households (000)	% of TV Households	% Pay HH of Cable HH
1965	1,300	2.3	---	---	---
1966	1,900	3.3	---	---	---
1967	2,300	3.9	---	---	---
1968	2,800	4.7	---	---	---
1969	3,500	5.7	---	---	---
1970	3,900	6.7	---	---	---
1971	4,600	7.7	---	---	---
1972	5,700	9.2	---	---	---
1973	6,600	10.2	---	---	---
1974	7,700	11.6	---	---	---
1975	8,600	12.6	140	0.2	1.6
1976	10,100	14.5	470	0.7	4.7
1977	11,200	15.9	980	1.4	8.7
1978	12,500	17.1	1,600	2.2	12.8
1979	13,600	18.3	3,100	4.2	22.8
1980	15,200	19.9	5,200	6.8	34.2
1981	17,830	22.3	8,100	10.1	45.5
1982	24,290	29.8	12,600	15.5	51.9
1983	28,320	34.0	16,160	19.4	60.9
1984	32,930	39.3	19,820	23.7	60.4
1985	36,340	42.8	21,840	25.7	59.0
1986	39,160	45.6	22,840	26.6	58.3
1987	41,690	47.7	22,850	26.1	54.8
1988	43,790	49.4	24,290	27.4	55.5
1989	47,770	52.8	26,100	28.9	54.6
1990	51,900	56.4	27,120	29.4	52.3

Source: Cable-A.C. Nielsen (NTI), Jan. 1 each year
TvB estimates for pay cable prior to 1982.

Cable TV's Projected Growth

At Year End	TV Households	Homes Passed	Cable TV Households	Cable TVHH as a % of: TVHH	Homes Passed
	---------- Add (000)----------				
1991	92,400	84,700	54,510	59	64
1992	93,400	86,200	56,590	61	66
1993	94,400	87,400	58,370	62	67
1994	95,500	88,400	60,130	63	68
1995	96,500	89,300	61,900	64	69
1996	97,600	90,100	63,380	65	70
1997	98,700	90,900	64,890	66	71
1998	99,800	91,700	66,430	67	72

Source: Paul Kagan Assoc.

Cable Penetration By County Size

County Size	1981	1982	1983	1984	1985	1986	1987	1988	1989
"A"	13.3%	17.4%	27.0%	31.6%	36.2%	39.0%	42.1%	44.8%	49.8%
"B"	28.9	35.0	43.7	48.4	51.8	54.3	56.0	58.5	61.9
"C"	43.1	46.0	50.8	53.8	55.3	56.4	57.0	58.8	61.1
"D"	27.4	31.7	38.3	40.3	41.8	42.4	43.1	44.7	47.0
Total	25.2%	28.9%	37.1%	41.2%	44.5%	46.7%	48.7%	51.1%	54.8%

Source: A.C. Nielsen (NSI)
Feb. each year

Cable Systems- A Profile

Cable Systems By Subscriber Size

	# Systems	% of Total Systems	% of Total Subscribers
50,000+	168	1.9%	34.6%
20,000-49,999	379	4.2	25.8
10,000-19,999	495	5.5	15.3
5,000- 9,999	662	7.3	10.2
1,000- 4,999	2,031	22.5	10.4
Under 1,000	4,762	52.9	3.7
NA	513	5.7	---
TOTAL	9,010	100.0%	100.0%

Cable Systems By Channel Capacity

	# Systems	% of Total Systems	% of Total Subscribers
54+	682	7.6%	20.6%
30-53	4,489	49.8	66.2
20-29	1,418	15.7	8.8
13-19	293	3.3	0.6
12 & Under	1,212	13.4	2.1
NA	916	10.2	1.7
TOTAL	9,010	100.0%	100.0%

Source: TV & Cable Factbook
1989 Edition

Cable Ad Volume & Projections

	Cable Ad Volume (In Millions)	% Cable of Total TV
1980	$ 53	0.5%
1981	117	0.9
1982	213	1.5
1983	332	2.0
1984	538	2.7
1985	724	3.4
1986	855	3.7
1987	963	4.0
1988	1,196	4.7
1989	1,490	5.5
1990	1,802	6.2
1991	2,126	6.8
1992	2,467	7.2
1993	2,837	7.7
1994	3,242	8.0
1995	3,693	8.5

Sources: McCann Erickson,
Paul Kagan Assoc., TVB

Cable TV Network Advertising Revenues
By Network - Top 10 in 1989

		In Millions			
		1986	1987	1988	1989*
1.	ESPN	$ 96.0	$125.0	$147.0	$173.5
2.	USA	71.0	80.0	114.4	160.2
3.	CNN**	93.5	110.0	130.9	157.1
4.	MTV	82.4	78.0	91.8	104.7
5.	LIFE	35.1	44.1	68.2	85.3
6.	TNN	42.0	49.0	72.5	83.5
7.	FAM	41.2	47.0	55.0	67.5
8.	NICK	16.4	26.8	31.8	48.2
9.	FNN	14.8	21.2	29.8	35.1
10.	A&E	8.0	13.5	23.2	31.9
	TOTAL TOP 10	$500.4	$594.6	$764.6	$947.0

*Preliminary Estimates

**Includes CNN Headline

Source: Paul Kagan Assoc., Inc.

Top 10 Cable Network Advertisers Jan. - June - 1989

---------- In Millions ----------

Rank	Parent Company	Cable	Network	Spot	Ntl. Synd.	Total
1.	Procter & Gamble	$ 16.7	$ 171.1	$ 95.9	$ 30.9	$ 314.6
2.	Time, Inc.	13.8	2.7	22.3	2.0	40.8
3.	Philip Morris	12.9	196.0	89.6	58.6	357.1
4.	Anheuser-Busch Cos.,Inc.	10.6	88.6	46.1	4.6	149.9
5.	RJR Nabisco	10.4	70.4	5.0	6.2	92.0
6.	General Motors Corp.	10.0	246.6	36.2	7.7	300.5
7.	General Mills	8.6	75.0	60.9	3.5	148.0
8.	Mars, Inc.	8.4	47.2	17.4	13.1	86.1
9.	Chrysler Corp.	6.7	85.6	25.8	.8	118.9
10.	Eastman Kodak	6.3	76.5	8.1	5.7	96.6
	Top 10 Total	$104.4	$1,059.7	$ 407.3	$ 133.1	$1,704.5
	% of Total	6.1%	62.2%	23.9%	7.8%	100.0%

Source: BAR

Coverage Factors of the Major Cable Networks

	% U.S. Coverage					
	1984	1985	1986	1987	1988	1989
FAM (was CBN)	25	32	35	39	44	49
CNN	30	37	39	44	50	55
ESPN	36	41	42	47	51	56
*HBO	23	25	22	22	22	23
*Showtime	8	10	9	9	10	11
USA	26	34	36	41	47	52
MTV	23	30	32	38	45	50
Nickelodeon	21	29	30	36	43	49
ARTS/Enter	19	23	22	28	36	41
Lifetime	-	25	28	34	41	47
TWC	13	19	23	29	37	42
CNN Headline	-	18	21	26	34	39
TNN	16	25	29	34	43	48
FNN	-	16	20	24	31	36
BET	-	-	10	14	20	24
Nick at Night	-	-	22	31	38	45
VH-1	-	-	13	21	28	34
Discovery	-	-	-	-	32	42

*Pay Services

Source : A.C. Nielsen (NTI)
Jan. each year

(-) = Not available

Cable Networks & Local Cable Channels Qualifying For Inclusion in the Local Market Rating Reports

	Number of Qualifying Markets*					
Cable Network:	Feb 1984	Feb 1985	Feb 1986	Feb 1987	Feb 1988	Feb 1989
HBO	33	28	18	16	12	14
CNN	2	2	11	14	15	30
ESPN	0	0	0	8	21	39
CBN	15	21	18	19	11	21
USA	5	12	22	52	49	116
Showtime	1	0	0	0	0	0
Nickleodeon	0	0	0	2	1	5
TNN	0	0	0	1	2	3
Local Cable Channel:	1	2	2	2	1	1

*Any cable network that achieved a 20% net weekly circulation.

Any local cable channel that achieved a 3% net weekly circulation.

Source: Arbitron

Cable Audience Fragmentation By Daypart

% TV HOUSEHOLDS VIEWING DURING AVERAGE MINUTE

	TOTAL CABLE				TOTAL U.S.			
	10 am-4:30 pm (M-F)	4:30 - 7:30 pm (M-F)	8-11 pm (M-S)	11 pm 1 am (M-S)	10 am-4:30 pm (M-F)	4:30- 7:30 pm (M-F)	8-11pm (M-S)	11pm-1 am (M-S)
Pay Cable								
CMX	0.3	0.4	1.0	1.2	0.2	0.2	0.6	0.7
HBO	1.1	1.2	3.3	2.5	0.7	0.7	2.0	1.5
SHOW	0.3	0.3	1.0	1.0	0.2	0.2	0.6	0.6
All Others	0.3	0.5	0.8	0.6	0.2	0.3	0.5	0.3
Ad-Supported								
AED	0.1	--	--	--	0.1	--	--	--
AEN	--	--	0.4	0.3	--	--	0.2	0.2
BET	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.1
CNN	0.6	0.6	1.0	0.5	0.4	0.4	0.6	0.3
DISCOVERY	0.2	0.3	0.6	--	0.1	0.2	0.4	--
ESPN	0.5	0.9	1.6	1.0	0.3	0.5	1.0	0.6
FAM	0.3	0.9	0.7	0.5	0.2	0.5	0.4	0.3
FNN	0.3	0.2	--	--	0.1	0.1	--	--
HLN	0.3	0.3	0.3	0.3	0.2	0.2	0.2	0.1
LIFETIME	0.3	0.7	--	--	0.2	0.4	--	--
MTV	0.6	0.9	0.7	0.5	0.4	0.5	0.4	0.3
NICK*	1.2	1.1	0.8	0.5	0.7	0.6	0.5	0.3
TNN	0.2	0.2	0.8	--	0.1	0.1	0.5	--
TNT	0.3	0.6	0.8	0.6	0.2	0.3	0.5	0.4
TWC	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.1
USA	0.9	1.0	2.1	1.2	0.5	0.6	1.2	0.7
VH-1	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.1
All Others	0.8	1.2	1.9	1.2	0.5	0.7	1.1	0.7

* Nickelodeon and Nick-At-Nite

Source: Nielsen Cable Activity Report
Third Quarter 1989

Time Spent Viewing: On Air vs. Cable

In The Average TV Household

Average Time Spent Per Household Per Day

	Over The-Air	Change in Mins.	% Total Viewing	Cable Orig.	Change in Mins.	% Total Viewing	Pay Cable	Change in Mins.	% Total Viewing
1982	6:25	N/A	92	:12	N/A	3	:22	N/A	5
1983	6:39	+14	90	:21	+9	5	:23	+1	5
1984	6:36	-3	88	:29	+8	7	:25	+2	5
1985	6:31	-5	87	:34	+5	7	:27	+2	6
1986	6:30	-1	87	:37	+3	8	:22	-5	5
1987	6:11	-19	84	:45	+8	10	:26	+4	6
1988	6:07	-4	82	:53	+8	12	:29	+3	6
1988(9mos)	6:04	-4	82	:51	+6	12	:29	+3	6
1989(9mos)	5:50	-14	79	1:03	+12	14	:29	--	7

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

Source: A.C. Nielsen (NTI)
Cable TV-A Status Report
Annual Averages

Prime Time Network Audience Trends During Cable's Growth Years

	3-Network			
	% HUT	AA %	SHARE	AA HOUSEHOLDS (millions)
1981	59.1	49.1	83	39.5
1982	59.0	46.3	78	38.0
1983	60.1	46.3	77	38.7
1984	59.9	44.6	74	37.5
1985	60.7	44.6	73	38.0
1986	59.9	43.8	73	37.8
1987	58.9	41.2	70	36.2
1988	58.4	38.4	66	34.3
1988 (9mos)	57.5	37.5	65	33.2
1989 (9mos)	57.7	37.1	64	33.5

HUT = Household Using Television

AA = Average Minute Audience

Source: A.C. Nielsen (NTI)
Annual Averages

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

Television Usage Per Week
By Cable Status of TV Households

	Non-Cable (42.2% of TVHH)		Basic Cable (27.2% of TVHH)		Pay Cable (30.6% of TVHH)		TV Households (100.0% of TVHH)	
	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share
Total*	44:33	100	47:32	100	57:01	100	49:13	100
Affiliates**	32:36	73	26:40	56	25:53	45	28:54	59
ABC	10:56	25	8:42	18	8:50	16	9:45	20
CBS	10:51	25	8:58	19	8:20	15	9:35	19
NBC	10:40	24	8:57	19	8:38	15	9:35	19
Ind. Com'l	12:04	27	9:52	21	11:41	21	11:25	23
Super Sta.	2:09	5	4:32	10	5:14	9	3:42	8
Local	9:13	21	3:58	8	5:23	9	6:33	13
Distant	:41	2	1:22	3	1:04	2	1:00	2
Public	2:01	5	1:37	4	1:24	2	1:41	3
Cable Orig.	-	-	11:37	24	13:24	24	7:24	15
Pay Service	-	-	-	-	10:06	18	3:12	6

* Sum of the parts exceed the total because of simultaneous viewing.

**Sum of the network is less than the total because viewing to multi-affiliates is included in the total.

Source: A.C. Nielsen (NTI)
Monthly Cable Status Report - April 1989

Stations and Channels Receivable vs. Viewed

	Average Receivable	Average Viewed	% Viewed
Total TV Households			
Total Channels	25.1	8.4	33%
Broadcast Stations	11.6	6.0	52%
Cable Channels	13.5	2.4	18%
Cable Households			
Total channels	36.7	11.3	31%
Broadcast Stations	12.1	6.7	55%
Cable Channels	24.5	4.5	19%
Non-Cable Households			
Total channels	11.8	5.2	44%
Broadcast Stations	11.0	5.2	47%
Cable Channels	0.8	*	--

Note: Viewed includes 10 or more continuous minutes during the week.

Source: Nielsen-NTI Feb 1-7, 1988

* Less than 0.1%

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1995	96,500	89,300	61,900	64	69
1996	97,600	90,100	63,380	65	70
1997	98,700	90,900	64,890	66	71
1998	99,800	91,700	66,430	67	72

Source: Paul Kagan Assoc.

Cable Penetration By County Size

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"D"	31.7	38.3	40.3	41.8	42.4	43.1	44.7	47.0	48.6
Total	28.9%	37.1%	41.2%	44.5%	46.7%	48.7%	51.1%	54.8%	57.8%

Source: A.C. Nielsen (NSI)
Feb. each year

Cable Systems- A Profile

Cable Systems By Subscriber Size

	# Systems	% of Total	% of Total Subscribers
50,000+	194	2.0%	37.4%
20,000-49,999	396	4.1	25.4
10,000-19,999	493	5.1	14.2
5,000- 9,999	646	6.7	9.3
1,000- 4,999	2,077	21.6	10.1
Under 1,000	5,082	52.9	3.6
NA	724	7.5	---
TOTAL	9,612	100.0%	100.0%

Cable Systems By Channel Capacity

	# Systems	% of Total Systems	% of Total Subscribers
54+	808	8.4%	24.0%
30-53	4,846	50.4	65.3
20-29	1,370	14.3	7.3
13-19	283	2.9	0.4
12 & Under	1,113	11.6	1.3
NA	1,192	12.4	1.7
TOTAL	9,612	100.0%	100.0%

Source: TV & Cable Factbook
1990 Edition

Cable Ad Volume & Projections

	Cable Ad Volume (In Millions)	% Cable of Total TV
1980	$ 53	0.5%
1981	117	0.9
1982	213	1.5
1983	332	2.0
1984	538	2.7
1985	724	3.4
1986	855	3.7
1987	963	4.0
1988	1,196	4.7
1989	1,527	5.7
1990	1,845	6.4
1991	2,197	7.2
1992	2,575	7.8
1993	2,969	8.5
1994	3,349	8.7
1995	3,788	9.3

Sources: McCann Erickson,
Paul Kagan Assoc., TVB

Cable TV Network Advertising Revenues
By Network - Top 10 in 1990

		In Millions				
		1986	1987	1988	1989	1990*
1.	ESPN	$ 96.0	$125.0	$147.0	$176.0	$228.8
2.	USA	71.0	80.0	114.4	160.2	208.2
3.	CNN**	93.5	107.0	138.5	180.5	207.6
4.	MTV	82.4	78.0	91.8	106.0	122.4
5.	LIFE	35.1	44.1	68.2	87.1	102.4
6.	TNN	42.0	49.0	72.5	83.5	96.9
7.	TNT	-	-	3.7	40.0	89.0
8.	FAM	38.1	45.8	54.0	68.0	78,0
9.	NICK	16.4	26.8	31.8	51.8	67.1
10.	A&E	8.0	13.5	23.2	36.2	48.6
	TOTAL TOP 10	$482.5	$569.2	$745.1	$989.3	$1249.0

*Preliminary Estimates

**Includes CNN Headline

Source: Paul Kagan Assoc., Inc.

Top 10 Cable Network Advertisers - 1989

		In Millions				
Rank	Parent Company	Cable	Network	Spot	Ntl. Synd.	Total
1.	Procter & Gamble	$ 36.1	$ 404.8	$ 218.1	$ 82.9	$ 741.9
2.	Time, Inc.	29.8	16.9	52.9	8.7	108.3
3.	Anheuser-Busch Cos.,Inc.	26.3	181.5	94.8	10.8	313.4
4.	General Mills	21.3	145.0	150.3	10.9	327.5
5.	General Motors Corp.	21.0	506.5	90.9	20.7	639.1
6.	Philip Morris	20.5	368.4	180.4	106.8	676.1
7.	RJR Nabisco	19.1	143.6	13.5	13.5	189.7
8.	Mars, Inc.	14.0	77.1	33.6	22.3	147.0
9.	Sears Roebuck & Co.	13.3	187.5	58.4	4.5	263.7
10.	Chrysler Corp.	11.8	140.6	51.5	4.9	208.8
	Top 10 Total	$213.2	$2,171.9	$ 944.4	$ 286.0	$3,615.5
	% of Total	5.9%	60.1%	26.1%	7.9%	100.0%

Source: Arbitron

Coverage Factors of the Major Cable Networks

	% U.S. Coverage						
	1984	1985	1986	1987	1988	1989	1990
FAM	25	32	35	39	44	49	52
CNN	30	37	39	44	50	55	59
ESPN	36	41	42	47	51	56	60
*HBO	23	25	22	22	22	23	23
*Showtime	8	10	9	9	10	11	12
USA	26	34	36	41	47	52	55
MTV	23	30	32	38	45	50	54
Nickelodeon	21	29	30	36	43	49	54
A & E	19	23	22	28	36	41	47
Lifetime	-	25	28	34	41	47	51
TWC	13	19	23	29	37	42	46
CNN Headline	-	18	21	26	34	39	44
TNN	16	25	29	34	43	48	53
FNN	-	16	20	24	31	36	36
BET	-	-	10	14	20	24	28
VH-1	-	-	13	21	28	34	38
Discovery	-	-	-	-	32	42	51

*Pay Services

Source : A.C. Nielsen (NTI)
Jan. each year

(-) = Not available

Cable Networks & Local Cable Channels Qualifying For Inclusion in the Local Market Rating Reports

	Number of Qualifying Markets*						
Cable Network:	Feb 1984	Feb 1985	Feb 1986	Feb 1987	Feb 1988	Feb 1989	Feb 1990
USA	5	12	22	52	49	116	150
ESPN	0	0	0	8	21	39	40
CNN	2	2	11	14	15	30	26
FAM	15	21	18	19	11	21	20
TNT	0	0	0	0	0	1	15
HBO	33	28	18	16	12	14	13
Nickleodeon	0	0	0	2	1	5	5
TNN	0	0	0	1	2	3	5
LIF	0	0	0	0	0	1	1
Showtime	1	0	0	0	0	0	0
Local Cable Channel:	1	2	2	2	1	1	1

*Any cable network that achieved a 20% net weekly circulation.

Any local cable channel that achieved a 3% net weekly circulation.

Source: Arbitron

Cable Audience Fragmentation By Daypart

% TV HOUSEHOLDS VIEWING DURING AVERAGE MINUTE

	TOTAL CABLE				TOTAL U.S.			
	10 am-4:30 pm (M-F)	4:30 - 7:30 pm (M-F)	8-11 pm (M-S)	11 pm 1 am (M-S)	10 am-4:30 pm (M-F)	4:30-7:30 pm (M-F)	8-11pm (M-S)	11pm-1 am (M-S)
Pay Cable								
CMX	0.3	0.4	1.0	1.1	0.2	0.2	0.6	0.7
HBO	1.0	1.3	3.1	2.3	0.6	0.8	1.9	1.4
SHOW	0.3	0.3	0.9	0.9	0.2	0.2	0.5	0.5
All Others	0.3	0.6	0.7	0.5	0.2	0.3	0.4	0.3
Ad-Supported								
A&E	0.2	--	0.6	0.5	0.1	--	0.4	0.3
BET	0.1	0.2	0.2	0.2	0.1	0.1	0.1	0.1
CNN	0.7	0.8	1.1	0.5	0.4	0.5	0.7	0.3
DISCOVERY	0.3	0.4	0.8	--	0.2	0.3	0.5	--
ESPN	0.6	1.1	1.9	1.1	0.3	0.7	1.2	0.7
FAM	0.3	0.9	0.7	0.4	0.2	0.6	0.5	0.2
FNN	0.2	0.1	--	--	0.1	0.1	--	--
HLN	0.3	0.3	0.3	0.2	0.2	0.2	0.2	0.1
LIFETIME	0.3	0.6	--	--	0.2	0.4	--	--
MTV	0.4	0.7	0.5	0.4	0.3	0.5	0.3	0.2
NICK	1.1	1.0	0.8	0.5	0.7	0.6	0.5	0.3
TNN	0.2	0.3	0.8	--	0.1	0.2	0.5	--
TNT	0.5	0.9	1.1	0.7	0.3	0.6	0.7	0.4
TWC	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.1
USA	1.0	1.2	2.2	1.4	0.6	0.7	1.3	0.9
VH-1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
All Others	1.0	1.6	2.5	1.5	0.6	1.0	1.6	0.9

Source: Nielsen Cable Activity Report
First Quarter 1990

Time Spent Viewing: On Air vs. Cable

In The Average TV Household

Average Time Spent Per Household Per Day

	Over The-Air	Change in Mins.	% Total Viewing	Cable Orig.	Change in Mins.	% Total Viewing	Pay Cable	Change in Mins.	% Total Viewing
1982	6:25	N/A	92	:12	N/A	3	:22	N/A	5
1983	6:39	+14	90	:21	+9	5	:23	+1	5
1984	6:36	-3	88	:29	+8	7	:25	+2	5
1985	6:31	-5	87	:34	+5	7	:27	+2	6
1986	6:30	-1	87	:37	+3	8	:22	-5	5
1987	6:11	-19	84	:45	+8	10	:26	+4	6
1988	6:07	-4	82	:53	+8	12	:29	+3	6
1989	5:54	-13	79	1:05	+12	15	:29	-	6

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

Source: A.C. Nielsen (NTI)
Cable TV - A Status Report
Annual Averages

Prime Time Network Audience Trends During Cable's Growth Years

	3-Network			
	% HUT	AA %	SHARE	AA HOUSEHOLDS (millions)
1981	59.1	49.1	83	39.5
1982	59.0	46.3	78	38.0
1983	60.1	46.3	77	38.7
1984	59.9	44.6	74	37.5
1985	60.7	44.6	73	38.0
1986	59.9	43.8	73	37.8
1987	58.9	41.2	70	36.2
1988	58.4	38.4	66	34.3
1989	58.3	37.8	65	34.9

HUT = Household Using Television

AA = Average Minute Audience

Source: A.C. Nielsen (NTI) Annual Averages

Note: Data prior to Sept.'87 based on NTI Audimeter Sample. From Sept. '87 data based on NTI People Meter Sample.

Television Usage Per Week
By Cable Status of TV Households

	Non-Cable (39.0% of TVHH)		Basic Cable (31.6% of TVHH)		Pay Cable (29.4% of TVHH)		TV Households (100.0% of TVHH)	
	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share	Wkly Hrs.	Share
Total*	44:00	100	45:37	100	56:36	100	47:23	100
Affiliates**	29:21	70	23:43	52	23:54	42	26:02	55
ABC	10:08	24	8:18	18	8:31	15	9:04	19
CBS	9:55	24	7:41	17	7:17	13	8:24	18
NBC	9:12	22	7:42	17	8:23	14	8:24	18
Ind. Com'l	12:12	29	9:26	21	11:22	20	11:05	23
Super Sta.	2:05	5	4:04	9	4:55	9	3:32	7
Local	9:29	22	4:21	10	5:35	10	6:43	14
Distant	:38	2	1:01	2	:50	1	:50	2
Public	1:50	4	1:24	3	1:10	2	1:31	3
Cable Orig.	-	-	12:43	28	14:52	25	8:24	18
Pay Service	-	-	-	-	10:38	19	3:22	7

* Sum of the parts exceed the total because of simultaneous viewing.

**Sum of the network is less than the total because viewing to multi-affiliates is included in the total.

Source: A.C. Nielsen (NTI)
Monthly Cable Status Report - April 1990

Stations and Channels Receivable vs. Viewed

	Average Receivable	Average Viewed	% Viewed
Total TV Households			
Total Channels	25.1	8.4	33%
Broadcast Stations	11.6	6.0	52%
Cable Channels	13.5	2.4	18%
Cable Households			
Total channels	36.7	11.3	31%
Broadcast Stations	12.1	6.7	55%
Cable Channels	24.5	4.5	19%
Non-Cable Households			
Total channels	11.8	5.2	44%
Broadcast Stations	11.0	5.2	47%
Cable Channels	0.8	*	--

Note: Viewed includes 10 or more continuous minutes during the week.

Source: Nielsen-NTI Feb 1-7, 1988

* Less than 0.1%